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ABSTRACT

This paper presents the results of a research study conducted in fall 1999 to examine the challenges facing higher educational institutions in migrating to distance learning. The study consisted of five case studies conducted at higher educational institutions in Pennsylvania. At each institution the researchers interviewed the president and other senior administrators and conducted a focus group with administrators and key faculty involved in distance education. Participants in the study reviewed and analyzed a comprehensive model developed by the researchers for applying principles of organizational agility to distance learning. Researchers investigated how institutions of higher education could strategically coordinate human resources, organizational dynamics, and distance learning technologies in a systematic way in order to gain and maintain a competitive edge in the educational marketplace, and in order to be more responsive to students. The study found that issues related to faculty and other personnel, marketing, competition, budget, and planning were more significant for the success of distance education than technological issues. Implications for planning and implementing successful distance programs are presented. (Author/AEF)

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Challenges Faced by Institutions of Higher Education in Migrating to Distance Learning

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Abstract

This paper presents results of an intensive comparative case study of five colleges and universities using distance education. The study, through interviews with the president and other senior administrators and focus groups with faculty and administrators involved in distance education, found that issues related to faculty and other personnel, marketing, competition, budget, and planning were more significant for the success of distance education than technological issues. Implications for planning and implementing successful distance programs are presented.

Opportunities and Challenges of Distance Learning

Distance learning technologies offer many new opportunities for institutions of higher education. These opportunities include: (a) facilitating improvements in the teaching/learning process; (b) expanding the geographic reach of an institution's programs; and (c) facilitating more effective service of the student population, e.g., offer convenience, greater course selection, and academically richer programs (Smith, 1998).

While educational technologies are a means to facilitate learning, distance learning is more than just an instructional delivery medium. Distance education represents a significant change from traditional instruction (Means, 1994). Distance education breaks from traditional instruction by changing the social dynamics of education, bringing the school to the student (Holloway and Ohler, 1995). Traditional classroom models may not provide the best models for the distance classroom because distance learning is fundamentally different. Instructors cannot simply switch from traditional to distance delivery systems; instead, substantial planning and organization is required to teach in a distance learning environment (Martin & Bramble, 1996; Gibson & Gibson, 1995). Further, students need an orientation to strategies of how to learn effectively in a distance learning environment (Martin & Bramble).

Typically, many institutions begin a distance education initiative encouraged by the many potential benefits, influenced by their competition, and prompted by the fear of not being involved in distance education. Colleges and universities report entering into a distance education initiative without sufficient planning, without a clear mission for the program, and without realizing many of the challenges that will surface as they conduct their program.

Description of the Study

This paper presents the results of a research study conducted in fall, 1999 to examine the challenges facing higher educational institutions in migrating to distance learning. The study consisted of five case studies conducted at higher educational institutions in Pennsylvania. Two institutions were large and three were small; two were public and three were private. Four of the five institutions had been identified as having considerable experience in distance learning.

At each institution the researchers interviewed the president and other senior administrators and conducted a focus group with administrators and key faculty involved in distance education. Participants in the studied reviewed and analyzed a comprehensive model developed by the researchers for applying principles of organizational agility to distance learning.

Data from the individual and group interviews were analyzed using standard procedures for the analysis of case study data. The researchers investigated how institutions of higher education could strategically coordinate human resources, organizational dynamics, and distance learning technologies in a systematic way in order to gain and maintain a competitive edge in the educational market place, and in order to be more responsive to students.

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Major Findings of the Study

While many educational administrators focus on technological hardware and software issues, they may overlook more important issues that are integral to success of their institution's distance learning efforts. The authors found that the institutions studied considered technological issues to be of lower priority in designing and conducting an effective distance learning program. The more significant factors that emerged as vital to the success of a distance education program involved human factors, specifically: interpersonal dynamics, attitudes, organizational culture, styles of management, and styles of communication.

The following categories of concern in migrating to offering distance education emerged from the research study:

1. faculty issues;
2. academic issues;
3. marketing/competition;
4. budget/fiscal;
5. planning;
6. personnel issues;
7. technological equipment.

Each of these categories of concern will be examined in more detail in the following sections. Implications for planning and implementing successful distance programs will be presented and discussed.

Faculty Issues

Faculty issues emerged as the major challenge facing institutions in migrating to offering distance education. Many faculty members joined their institutions without experience or knowledge in technology. Fearing changes in working conditions and potential loss of job security, many faculty resist learning about or using distance technologies. Some faculty members stated that they would retire rather than use technology in their classroom. Administrators found that they must work to educate faculty and to encourage them to participate in distance education. Overcoming faculty resistance to distance learning emerged as the major issue in conducting a distance learning program. For example, faculty resistance is visible in the influence of the faculty union within public institutions. Faculty unions complicate the course approval process for distance courses, pressure the faculty to not participate in distance learning activities, and lobby for significantly increasing financial remuneration for faculty participating in distance courses.

Academic Issues

Faculty members mentioned many academic challenges to offering distance courses. Among these were the challenges of:

1. intellectual property rights;
2. having distance courses pass through the course approval process;
3. exam honesty for remote sites;
4. providing an adequate help desk to support students;
5. the need to provide orientation programs for distance learning students;
6. the need to address residency requirements for distance programs.

Marketing and Competition Issues

Institutions were concerned with institutional reputation and image when it comes to offering distance education. They realized that distance education will expose the quality of their program, and they feared that offering a poor quality program may damage their reputation. While institutions felt pressure to get involved in distance learning, they were concerned with competing in a market against private, for-profit institutions that exclusively offer distance education. Institutions were concerned about their program mission and about specifically defining their niche regarding offering distance education.

Budget and Fiscal Issues

All of the institutions mentioned budget issues quite frequently. Issues of special concern were ways to fund the high startup costs involved in distance learning and the funding the ongoing costs involved in offering distance learning programs. The need to use scarce resources more efficiently is prompting all of the institutions studied to identify their core competencies (those areas in which they excel), and to use these core competencies as the basis on which to enter the distance learning arena. Further, in order to function more efficiently and effectively in an increasingly competitive environment, all of the institutions presented evidence of seeking out partnerships

with other institutions where it enhanced their distance learning academic programs. All reported realizing considerable benefits from partnering, including increased efficiency, enhanced program efforts, and positive experience for faculty.

Planning

Subjects at each of the five institutions studied reported that past planning for technology and distance learning was insufficient. Several institutions demonstrated a need for assistance in long-range, strategic planning for technology. Subjects from two institutions indicated failed attempts at strategic planning.

Subjects from two institutions expressed concern over their inability to finalize certain key decisions in this area. Further, subjects from two of the small, private institutions indicated a need to make definitive decisions, which if not made would seriously impede further institutional progress.

Two institutions indicated that planning receives more attention after an institution has been involved in distance learning for about two to three years, after personnel become more aware of the realities of distance learning and the need to invest in more conscientious planning. Although evidence of basic planning regarding distance learning was found in the two public institutions, as stated earlier, evidence of more careful, conscientious planning was found in the two small, private institutions.

Personnel Issues

In addition to challenges related to faculty, challenges related to hiring and dealing with non-faculty personnel also surfaced in the study. Problems cited included difficulties in identifying and hiring qualified distance learning coordinators, which are related to the problem of offering competitive salaries for distance learning technical personnel. One institution reported hired a technology director who was ineffective in relating to and dealing with faculty. This person, apparently more concerned about the equipment than the people involved, prevented the faculty from practicing and using technological equipment, and set back the institution's distance learning efforts significantly.

Technological Equipment

One definite challenge reported by all five institutions studied was designing and implementing distance learning programs is selecting, financing, and maintaining technological equipment. The selection of hardware and software also impacts on staffing decisions. More sophisticated hardware and software may provide greater capabilities for the distance learning program, but the potential advantages will not be realized if the additional competent staff support required and advanced faculty training are not provided at the same time. If the institution is planning on partnering with other institutions, than decision factors in the selection of equipment extend outside of the institution itself to its partners, in order to ensure compatibility.

Implications for Planning and Implementing Successful Distance Programs

Analysis of the data collected from individual and group interviews with faculty and administrators at the five institutions of higher education studied provides support for a number of recommendations for effective practice of distance learning academic programs. These recommendations relate to faculty and staff support, program planning, and program organization. These implications will be discussed below.

Invest In and Support Faculty and Faculty Initiatives

Individuals responsible for developing distance learning programs should attempt to harness the wealth of talent and expertise already available at their institution. Colleges and universities should invest in the faculty by providing ample training opportunities, by capitalizing on the interests of the faculty, and by providing support for faculty initiatives. The institution should create an atmosphere where faculty feel safe to experiment with using distance technologies in new ways. Faculty should be encouraged to explore how to take advantage of the unique capabilities of particular technologies to improve the teaching/learning process.

Initiate Dialogue with Faculty

Be aware that overcoming faculty resistance to distance learning is a major challenge in conducting a distance learning program. Initiate a dialogue between faculty and administrators to determine and address the concerns of faculty regarding distance education. Be sensitive to faculty concerns about changes in working conditions and potential loss of job security.

Educate faculty about the importance of a distance learning initiative to the institution. Involve faculty and support staff by making available: (a) information that describes how effectively the institution is meeting its

mission; (b) information about strategic imperatives being planned and initiatives being undertaken; (c) information about the challenges and problems faced by the institution; and (d) information about the institution's financial stability. Help facilitate faculty's discovery of how distance learning supports the institution's mission, how it helps address particular institutional challenges, and how it adds to the stability of the institution.

Work to Overcome Faculty Resistance and Increase Faculty Buy-In

Educate the faculty about the benefits of using technology in the classroom. Faculty are motivated by the ability to improve the teaching/learning process. Distance technologies hold great potential to enrich the classroom, to connect students with the larger research community, and to bring authentic examples into a lesson. Provide training opportunities to faculty to enlighten them about the benefits of using distance education technologies both for themselves (e.g., connecting with other colleagues, benefits to research) and for their students (e.g., improved access to information resources, networking within a larger community of scholars).

Engage in More Conscientious, Focused Planning

Begin by defining a clear and focused mission for the distance education program. Capitalize on the sense of community on the campus. Open a dialogue between faculty and administrators to discuss the various issues, challenges, and implications that arise in offering distance education.

Hire Technologists with Strong Interpersonal Skills

Technical support personnel with excellent technological knowledge and skills who do not also have excellent interpersonal skills will not be able to support faculty in learning to use distance learning technologies effectively. The interpersonal skills required include in particular the ability to empathize with novice learners and the ability to explain procedures using vocabulary the novice learner can understand.

Develop a Shared Vision

Promote open discussion about distance learning programs involving all levels of the campus community, including faculty, students, and support staff. Do not establish a "top-down" directive. Instead, work cooperatively to produce a shared vision that the whole campus community has helped to develop. This approach will result in an increased number of individuals feeling ownership of the vision, and more people will support the vision.

Plan and Support Migration (Evolutionary Change) Vs. Revolutionary Change

Evolutionary change is less threatening, is easier to implement, and is easier to sustain. Support this migration by investing in faculty training, by providing sufficient support staff, and by supporting faculty efforts.

Integrate Distance Learning Technologies into the Overall Academic Program

Instead of viewing distance education as a separate entity, treat distance learning technologies as effective new tools to enhance the teaching/learning process. Invest in support staff, equipment, and training in order to make the atmosphere conducive for faculty to integrate these technologies into classes on a regular basis.

Provide Adequate Support Staff for Development and Delivery of Distance Learning

Invest in hiring instructional designers and other technological support personnel to relieve faculty of dealing with the technological burdens involved in offering distance learning classes. This will enable the faculty to concentrate on substantive issues instead of becoming bogged down in technical operational details.

Revise Traditional Policies and Practices to Support Distance Learning Students

Realize that distance learning is fundamentally different from learning in the traditional classroom. Consider traditional practices, services, and policies and how they may need to be revised to accommodate the needs of learners and instructors participating in distance education.

Match Distance Learning Technologies to Institutional Conditions and Needs

Select distance delivery systems that provide an appropriate fit with the institution's mission and context. Before selecting delivery systems, ensure that the medium selected will effectively and efficiently address the needs of the institution.

Emphasize the Role of Distance Learning Technologies in Promoting Academic Goals

In addressing the faculty, approach distance learning as a tool with the potential to improve the teaching/learning process. Do not approach it as a way to primarily advance administrative goals without regard to academics.

Elements of Successful Distance Learning Programs

A further review and analysis of the data collected from the five institutions studied revealed a number of essential elements that were shared by all of the distance learning programs that seemed to be positioned for future success in offering productive distance learning programs:

1. Administrators opened a dialogue that involved the whole college community in planning and in developing a vision of distance learning.
2. Administrators were sensitive to the concerns of faculty. They addressed the concerns of employment conditions, job security, compensation, and the faculty's fear of learning and using new technologies.
3. Administrators committed resources to invest in the faculty. They sought to educate the faculty as to the benefits of using technologies, provided training opportunities, provided support for faculty in learning and using technology, and encouraged faculty exploration and experimentation.
4. The institutions attempted to integrate technologies into the traditional classroom to improve the teaching/learning process, rather than introducing new technologies only for distance learning programs. Distance learning was presented as an extension of the use of technology to promote teaching and learning, rather that a means to produce mass education more economically, to increase revenues, or to increase market share.
5. Administrators and faculty realized that distance learning was fundamentally different from the traditional classroom model, and would thus require a reconsideration of various traditional practices, policies, and working conditions. At the least, they openly dealt with these issues as they arose. At best, they initiated steps to determine in advance what these changes were and how they could best be addressed.

Conclusion

While educational technologies are a means to facilitate learning, distance education is more than just an instructional delivery medium. In the process of offering distance education, the institutions studied either discovered or were beginning to discover that distance learning is fundamentally different from traditional instruction in the following ways:

- Distance learning involves addressing changes in historical practice and policy that have to date adequately supported the traditional classroom model.
- An effective distance learning program, by contrast, requires the application of new models of instruction, new instructional methodologies and skills, and new ways to learn effectively.
- Distance learning also involves a change in the ways students are served, the ways academic programs are marketed, and the ways in which instruction is organized and delivered.

In this new environment, educators have had to address many issues, including the following: (a) faculty compensation; (b) models of office hours and other faculty responsibilities; (c) intellectual property rights; (d) supporting students who rarely if ever visit the campus. Further, distance learning provides a vehicle for responding to the educational needs and demands of an information society by allowing instruction to: (a) change from a focus on teaching to a focus on learning; (b) change from memorizing information to harnessing it; (c) become more student-centered; (d) utilize authentic forms of assessment; (e) evolve beyond using the same instructional strategy for all students. The researchers hope that by exploring and exposing some of the challenges institutions face in planning, developing, and implementing academic distance learning programs, their research will help educational professionals realize that the problems they face are common to all institutions. It is hoped that the findings of this study, and the implications of those findings, will improve the practice of distance learning in higher education.

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